

## Message Text

UNCLASSIFIED

PAGE 01 MOSCOW 03836 01 OF 03 071428Z  
ACTION EUR-12

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TO SECSTATE WASHDC 8701

UNCLAS SECTION 01 OF 03 MOSCOW 03836

DEPT PASS USDA ELECTRONICALLY FOR FAS/FCA/LIVESTOCK/ESCS/  
SCHOONOVER

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SUBJECT: USSR AGRICULTURAL SITUATION REPORT - LIVESTOCK  
AND PRODUCTS (SS8010 - 24A)

### A. 1977 REVIEW:

1. PRODUCTION: OUTPUT OF MAJOR LIVESTOCK PRODUCTS  
REBOUNDED SHARPLY IN 1977 ON THE STRENGTH OF HIGHER ANIMAL  
INVENTORIES, GENERALLY GOOD FEED AND FODDER AVAILABILITY,  
AND PERHAPS A TIMELY ANNOUNCEMENT BY THE GENERAL  
SECRETARY. ALL PUBLISHED GOALS WERE EXCEEDED. MEAT PERFORMANCE,  
HOWEVER, REMAINED BELOW THE PEAK 1975 LEVEL WHEN OUTPUT WAS  
AFFECTED BY DISTRESS SLAUGHTER.

USSR: PRODUCTION OF MAJOR LIVESTOCK PRODUCTS (MILLION  
TONS):

-	-	-	1977	1978	1976-80	
-	1975	1976	PLAN	ACTUAL	PLAN	PLAN 1/
MEAT 2/	15.0	13.6	14.5	14.8	15.6	16.4
MILK	90.8	89.7	92.0	94.8	95.4	96.2
EGGS 3/	57.5	56.2	58.2	61.0	62.6	62.4

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PAGE 02 MOSCOW 03836 01 OF 03 071428Z

WOOL 4/ 467 436 NA 458 NA 473  
1/ ANNUAL AVERAGE; 2/ SLAUGHTER WEIGHT; 3/ BILLION PIECES;  
4/ THOUSAND TONS

2. WHILE STRONG PERFORMANCE WAS EARLY APPARENT IN MILK,  
EGGS AND WOOL, THE 1977 MEAT RESULTS EXCEEDED OUR  
EXPECTATIONS, AND RAISED SOME UNRESOLVED QUESTIONS IN

LIGHT OF THE 7 PERCENT BELOW-PLAN OUTPUT BY THE SOCIALIZED SECTOR (SEE MOSCOW 2034).

3. MAJOR CONTRIBUTING FACTOR TO THE IMPROVED LIVESTOCK PRODUCTION WAS SIMPLY THE SHARP INCREASE IN ANIMAL NUMBERS IN COMPARISON WITH 1976 (POST LIQUIDATION) LEVELS, PARTICULARLY FOR POULTRY AND PIGS.

USSR: PEAK ANIMAL NUMBERS (MILLION HEAD):

-	-	-	-	1977 AS	1977 AS
-	-	-	-	PERCENT	PERCENT
-	-	1975	1976	1977	1976 1975
CATTLE	87.0	87.8	90.6	103	104
COWS	27.5	27.8	28.8	104	105
PIGS	56.8	49.3	55.5	113	98
POULTRY	577.2	506.1	598.0	118	104
SHEEP/GOATS	151.8	144.4	149.2	103	98

4. THE LARGER HERDS WERE SUPPORTED BY A RECORD 1976 GRAIN CROP AND, WHEN 1977 GRAIN PRODUCTION FELL 8 PERCENT SHORT OF PLAN BY SUBSTANTIAL IMPORTS. MOREOVER, THE FODDER SITUATION DURING THE LAST TWO YEARS HAS BEEN UNUSUALLY FAVORABLE. IT'S WORTH NOTING, FOR EXAMPLE, THAT ALTHOUGH 1977 AND 1974 GRAIN CROPS WERE OF THE SAME SIZE, 1977 FODDER PRODUCTION WAS 11 PERCENT HIGHER. THIS IS NOT TO SAY THAT THERE WERE NOT AREAS IN WHICH FODDER WAS AND PROBABLY IS IN SHORT SUPPLY. FOR EXAMPLE, LIVESTOCK UNCLASSIFIED

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PAGE 03 MOSCOW 03836 01 OF 03 071428Z

COMPLEXES IN THE TRANS-VOLGA REGION WERE NO DOUBT ADVERSELY AFFECTED BY BELOW NORMAL RAINFALL AND POOR PASTURE/FODDER CONDITIONS. OVERALL FEED PROTEIN WAS ALSO A LITTLE SHORTER IN 1977 THAN IN 1976, AS PRODUCTION OF PULSES FELL BY 1.2 MILLION TONS (14 PERCENT).

USSR: FODDER PRODUCTION (000 TONS):

-	-	1974	1975	1976	1977
HAY	-	31,536	26,273	28,310	28,754
HAYLAGE, GREENCHOP	-	201,803	169,851	224,202	239,537
- SILAGE, MEAL					
FODDER CORN	-	226,464	191,827	277,136	245,366
FODDER ROOTS	-	41,765	32,055	47,836	41,813
FODDER SUGARBEETS	-	2,169	1,080	2,139	2,090
TOTAL	-	503,737	421,086	579,623	557,560

5. IN LINE WITH INCREASED LIVESTOCK PRODUCTION, STATE PROCUREMENTS OF ANIMAL PRODUCTS ALSO ROSE.

USSR: STATE PURCHASES OF MAJOR LIVESTOCK PRODUCTS (MILLION TONS):

-	-	-	-	1978 AS
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- - - - PERCENT  
 - - 1971-75 1976 1977 1977

MEAT (SLAUGHTER WEIGHT) 9.9 9.3 10.3 111  
 MILK - 52.1 56.2 60.8 108  
 EGGS (BILLION PIECES) 27.5 32.9 36.8 112  
 WOOL (000 TONS) 479 481 513 107

6. LARGER PROCUREMENTS WERE, IN TURN, GENERALLY REFLECTED  
 IN THE IMPROVED PERFORMANCE OF THE FOOD AND FIBER PROCES-

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PAGE 01 MOSCOW 03836 02 OF 03 071434Z  
 ACTION EUR-12

INFO OCT-01 ISO-00 AID-05 CIAE-00 COME-00 EB-08 FRB-01  
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 -----004969 071511Z /43

R 071414Z MAR 78  
 FM AMEMBASSY MOSCOW  
 TO SECSTATE WASHDC 8702

UNCLAS SECTION 02 OF 03 MOSCOW 03836

SING INDUSTRY, THOUGH IN MOST CATEGORIES PLAN WAS NOT MET:

USSR: FOOD & FIBER PROCESSING:

- - - - 1977 1977  
 - - 1975 1976 PLAN ACTUAL

MEAT (MILLION TON) 9.9 8.4 9.8 9.1  
 SAUSAGE (000 T) 2,953 2,950 3,010 3,000 1/

WHOLE MILK (MILLION TON) 23.6 23.4 24.6 24.3  
 BUTTER (000 T) 1,231 1,263 1,340 1,408  
 DRIED MILK/CREAM (000 T) 316 327 NA 354

WOOLEN FABRIC (MILLION  
 - SQUARE METERS) 740 764 816 800 1/

1/ NUMBERS ARE HIGHLY ROUNDED IN END OF YEAR REPORTS, AND  
 THUS RESIST COMPARISONS.

7. TRADE: 1977 MEAT IMPORT FIGURES ARE NOT YET AVAILABLE,

BUT DATA FROM USUAL (WESTERN) SUPPLIERS INDICATES A TOTAL  
 EQUAL TO, OR SLIGHTLY ABOVE THE 1976 LEVEL OF 479,000 TONS.  
 MAJOR SUPPLIERS WERE AGAIN OCEANIA AND ARGENTINA WITH  
 NEARLY 200,000 TONS (ABOUT 85 PERCENT BEEF/VEAL AND 15  
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PAGE 02 MOSCOW 03836 02 OF 03 071434Z

PERCENT MUTTON) AND EASTERN EUROPE. IN SPITE OF WINTER  
 LOSSES, MONGOLIA REPORTEDLY HONORED ITS COMMITMENT, PRO-  
 VIDING 80,000 - 90,000 TONS OF LIVE STOCK (SLAUGHTER  
 BASIS). MOST SIGNIFICANT FEATURE OF 1977 IMPORT ACTIVITY  
 WAS APPARENT SHIFT IN COMPOSITION OF IMPROVED MEATS.  
 POULTRY GREW TO AN ESTIMATED 20 PERCENT OF TOTAL VOLUME  
 WITH THE MAJOR SUPPLIERS BEING THE E.C. (PRINCIPALLY  
 HOLLAND, FRANCE AND DENMARK), THE U.S., AND HUNGARY  
 (TURKEYS AND DUCKS).

USSR: MEAT IMPORTS (TONS):

-	-	-	-	1977
-	-	1975	1976	(ESTIMATED)

CHILLED RED MEAT	406,140	225,751	250,000
POULTRY	-	- 48,274	57,995 100,000
OTHER MEAT/PRODUCTS	60,807	77,716	50,000
- SUBTOTAL	- 515,221	361,462	400,000

MEAT FROM LIVE IMPORTS

- (SLAUGHTER WEIGHT)	259,927	117,413	100,000
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TOTAL IMPORTS	775,148	478,875	500,000
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8. SOVIET IMPORTS OF BUTTER AND DRY WHOLE MILK WERE AN  
 ESTIMATED 60,000 AND 30,000 TONS RESPECTIVELY, WITH THE EC  
 PROVIDING MOST OF THE BUTTER, AND THE DRY WHOLE MILK BEING  
 OBTAINED FROM FINLAND AND NEW ZEALAND.

9. LAST YEAR'S USSR MEAT AND (BUTTER) EXPORTS ARE ESTI-  
 MATED TO HAVE BEEN AT ABOUT THE 1976 LEVEL, 40,000 AND  
 20,000 TONS RESPECTIVELY.

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PAGE 03 MOSCOW 03836 02 OF 03 071434Z

USSR: MEAT AND DAIRY EXPORTS (TONS):

-	-	1975	1976	1977 (EST.)
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MEAT/MEAT PRODUCTS	44,266	40,857	40,000
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BUTTER - 19,999 16,515 20,000

B. 1978 OUTLOOK:

10. PRODUCTION: THE SOVIET UNION IS IN A "NO LOSE" POSITION SO FAR AS 1978 MEAT PRODUCTION IS CONCERNED. ANIMAL INVENTORIES ARE UP SIGNIFICANTLY FROM FEBRUARY 1977 LEVELS. IF FEED AND FODDER SUPPLIES ARE GOOD, MEAT OUTPUT WILL GROW AT A STEADY PACE, THOUGH PROBABLY NOT TO THE PLANNED LEVEL (15.6 MILLION TONS); IF THE FEED AND FODDER POSITION WORSENS, AND DISTRESS SLAUGHTER ENSUES, MEAT PRODUCTION WILL ACCELERATE (WITH, OF COURSE, UNDESIRABLE 1979 CONSEQUENCES). OUR ESTIMATE, BARRING THE LATTER, IS NOT MORE THAN 15.5 MILLION TONS WHICH OF COURSE WILL BE A NEW RECORD.

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PAGE 01 MOSCOW 03836 03 OF 03 071441Z  
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R 071414Z MAR 78  
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UNCLAS SECTION 03 OF 03 MOSCOW 03836

USSR: FEBRUARY 1 LIVESTOCK INVENTORIES, SOCIALIZED SECTOR  
(MILLION HEAD):

-	-	-	-	FEBRUARY	FEBRUARY
-	-	-	-	1978 AS	1978 AS
-				FEBRUARY	FEBRUARY
-	-	1978	1977	1975	1977 1975

CATTLE	86.8	85.0	81.0	102	107
PIGS	53.0	48.6	53.5	109	99
POULTRY	496.5	442.9	404.9	112	123
SHEEP/GOATS	118.8	117.8	119.6	101	99

11. GIVEN ADEQUATE FEED AND FORAGE SUPPLIES, MOLK, EGG AND WOOL GOALS SHOULD BE EASILY ACHIEVED.

12. PROCUREMENT AND PROCESSING GOALS HAVE, TO OUR KNOWLEDGE NOT BEEN ANNOUNCED. JANUARY FOOD INDUSTRY PERFORMANCE HAS BEEN GENERALLY STRONG, BUT CANNOT, OF COURSE, BE TAKEN AS PREDICTIVE OF FINAL 1978 RESULTS.

USSR: PRODUCTION OF MEAT AND DAIRY INDUSTRIES, CENTRALIZED ONLY, JANUARY:

UNCLASSIFIED

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PAGE 02 MOSCOW 03836 03 OF 03 071441Z

-	-	JANUARY	JANUARY	JANUARY	JANUARY
-	-	1978	1977	1976	1975

MEAT (000 T)	-	747	643	834	1/	859
SAUSAGE (000 T)		242	232	223		227

WHOLE MILK (MIL T)		2.0	1.9	1.8	1.9
BUTTER (000 T)		62.0	64.3	51.8	50.2
DRIED MILK/CREAM (000 T)		17.0	16.4	13.9	14.5

1/ REFLECTS DISTRESS SLAUGHTER ACTIVITY

13. WE SEE NO REASON TO EXPECT ANY MAJOR SHIFTS IN TRADE DURING 1978. EVEN IF MEAT PRODUCTION REACHES PLAN, IMPORTS INCLUDING SLAUGHTER ANIMALS WILL LIKELY REMAIN AT THE 500,000 TON LEVEL.

C. TENTH PLAN PROGNOSIS:

14. RECENT YEARS HAVE SEEN MAJOR SHIFTS IN THE STRUCTURE OF THE LIVESTOCK INDUSTRY. STATE AND COLLECTIVE FARMS HAVE BEEN TURNING OVER THE STOCK-RAISING FUNCTION (AT TOO RAPID A PACE, ACCORDING TO SOME HIGH OFFICIALS) TO INTER-FARM, HIGHLY SPECIALIZED COMPLEXES AND CENTRALLY DIRECTED PRODUCTION ORGANIZATIONS, E.G., PTITSEPROM AND GLAVZHIV-PROM. THE 6,327 INTER-FARM COMPLEXES IN EXISTENCE AT THE END OF THE NINTH PLAN (1975) ARE TO BE INCREASED TO 9,000 BY 1980. BY THEN, THESE LARGE COMPLEXES ARE TO PRODUCE 16 PERCENT OF DAIRY RAW MATERIALS, 22 PERCENT OF BEEF, AND 32-36 PERCENT OF PORK. THE FIGURE FOR POULTRY PRODUCTS WAS NOT PUBLISHED; WE ESTIMATE IT AT AROUND 50 PERCENT. IN 1977 ALONE, SWINE RAISING CAPACITY WAS INCREASED BY 137,000 TONS, AND CATTLE BY 48,000 (COMPARED WITH 113,000 AND 44,000 RESPECTIVELY IN 1976). ABOUT 20 OF THE ANTICIPATED

UNCLASSIFIED

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PAGE 03 MOSCOW 03836 03 OF 03 071441Z

50 PIG UNITS OF 108,000 HEAD EACH ARE NOW OPERATIONAL.

15. PARADOXICALLY, THERE HAS ALSO BEEN, IN RECENT MONTHS, AN INCREASED EMPHASIS ON PRIVATE STOCK RAISING. PERMISSIBLE "HERD" SIZES HAVE BEEN INCREASED, AND STATE AND COLLECTIVE FARMS HAVE BEEN ENJOINED TO HELP PROVIDE ADEQUATE FEED AND FODDER (SEE POLICY CABLE). THERE HAS EVEN BEEN A PUSH TO INVOLVE SUBURBAN RESIDENTS IN STOCK RAISING THROUGH A PROGRAM UNDER WHICH AN ANIMAL CAN BE ADOPTED FOR THE SUMMER AND THE LEASEE RENUMERATED ON A RUBLES PER KILO OF GAIN BASIS.

16. IN ADDITION TO THESE STRUCTURAL CHANGES, THE SOVIETS ARE CONTINUING TO UPGRADE THE GENETIC QUALITY OF THEIR STOCK THROUGH IMPORTS OF LIVE ANIMALS AND SEMEN. FEED QUALITY IS ALSO BEING IMPROVED BY IMPORTS OF HIGH PROTEIN MEAL AND DEVELOPMENT OF THE MIXED FEED INDUSTRY, WHICH LAST YEAR PRODUCED 51 MILLION TONS COMPARED WITH 37.7 IN 1974.

17. SOLID PERFORMANCE IN ALL OF THE ABOVE AREAS WILL BE NECESSARY IF THE SOVIETS ARE TO ACHIEVE THEIR PRIORITY FOOD GOAL -- INCREASED MEAT AVAILABILITY. HOWEVER, AS IT APPEARS NOW, THE RECENTLY REVISED 16.4 MILLION TON TENTH PLAN MEAT GOAL (ANNUAL AVG.) IS UNLIKELY TO BE ACHIEVED, PUTTING OFF TO AN EVEN LATER DAY THE REALIZATION OF THE LONG-TERM CONSUMPTION GOAL - 85 KILOGRAMS OF MEAT PER CAPITA. TOON

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## Message Attributes

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